



USDA TURKEY MARKET NEWS REPORT

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Agricultural Marketing Service

Poultry Programs

Market News Branch

NATIONAL TURKEY MARKET AT-A-GLANCE



DOMESTIC MARKET HIGHLIGHTS

The trade sentiment on fresh and frozen whole birds was mostly steady. Light trading was reported. Demand was light for both prompt and deferred shipments. Offerings remain adequate for the less than robust demand. Bulk parts and meats trading was slow. Demand was mixed and ranged from light to good as buyers are price conscious and selective.

EXPORT MARKET HIGHLIGHTS

Trading and demand was light to moderate. Inquiry was moderate. Interest remains focused on product going into the export area. Supplies are mixed and vary regionally.

WHOLE YOUNG TURKEYS, FROZEN 1/, CONSUMER SIZES, COMMODITY PACK OR EQUIVALENT, US GRADE A, CENTS PER LB, DELIVERED (MINIMUM 10,000 LB LOTS) **AUGUST 01, 2003**

CURRENT SHIPMENTS 2/

	OFFERS	SALES	WTD AVG	VOLUME (000)	WTD AVG	VOLUME (000)	DEL. PER	VOLUME (000)	DEL. PER
8-16 LB HENS									
EASTERN REGION 3/	56-59	-	-	-	-	-	-	-	-
CENTRAL REGION 4/	55-57	56	56.00	40	60.00	80	OCT	-	-
WESTERN REGION 5/	58-60	-	-	-	-	-	-	-	-
16-24 LB TOMS									
EASTERN REGION	55-58	-	-	-	-	-	-	-	-
CENTRAL REGION	55-56	-	-	-	60.00	40	OCT	-	-
WESTERN REGION	57-58	-	-	-					

WHOLE YOUNG TURKEYS, FROZEN 1/, CONSUMER SIZES, COMMODITY PACK OR EQUIVALENT, US GRADE A, CENTS PER LB, DELIVERED (MINIMUM 10,000 LB LOTS) **JULY 31, 2003**

CURRENT SHIPMENTS 2/

	OFFERS	SALES	WTD AVG	VOLUME (000)	WTD AVG	VOLUME (000)	DEL. PER	VOLUME (000)	DEL. PER
8-16 LB HENS									
EASTERN REGION 3/	56-59	-	-	-	-	-	-	-	-
CENTRAL REGION 4/	55-57	57	57.00	40	-	-	-	-	-
WESTERN REGION 5/	58-60	-	-	-	-	-	-	-	-
16-24 LB TOMS									
EASTERN REGION	55-58	-	-	-	-	-	-	-	-
CENTRAL REGION	55-56	-	-	-	-	-	-	-	-
WESTERN REGION	57-58	-	-	-	-	-	-	-	-

1/ May include product stored at temperatures in range of 1 to 25 degrees F. 2/ Includes product priced for shipment within 14 days.

3/ Includes product with 3 percent broth basting. 4/ Includes product with 3-6 percent broth basting. 5/ Includes products with 6 percent broth basting. 6/ Includes product committed for pricing during the previous 24 hours but shipment in more than 14 days from date of commitment. 7/ Includes product committed during previous 24 hours at prices to be determined at later date.

WEIGHTED AVERAGE PRICES FOR WHOLE YOUNG TURKEYS, FROZEN CONSUMER SIZES, COMMODITY PACK OR EQUIVALENT, US GRADE A, CENTS PER LB, DELIVERED (MINIMUM 10,000 LB LOTS)

WEEK OF AUGUST 01, 2003	CURRENT WEEK	LAST WEEK	SAME WEEK YEAR AGO	MONTH OF JULY	CURRENT WEEK	LAST WEEK	SAME WEEK YEAR AGO
8-16 LB HENS				8-16 LB HENS			
EASTERN REGION	57.35 **	57.25 **	66.51	EASTERN REGION	58.18	60.12	66.52
CENTRAL REGION	55.15	56.00 **	64.67	CENTRAL REGION	56.70	59.10	65.77
WESTERN REGION	59.20 **	59.50 **	66.00 **	WESTERN REGION	59.73	60.01	66.39
16-24 LB TOMS				16-24 LB TOMS			
EASTERN REGION	56.50 **	56.50 **	59.50 **	EASTERN REGION	57.32	58.83	60.64
CENTRAL REGION	54.25	55.50 **	59.70 **	CENTRAL REGION	56.20	57.38	59.77
WESTERN REGION	57.30 **	57.00 **	60.40 **	WESTERN REGION	57.64	57.88	60.41

**SOUTHERN CALIFORNIA (L.A. AREA) PROCESSED TURKEY,
DELIVERED TO RETAILERS**

	<u>RANGE</u>
FRESH TURKEYS Y HENS 8-16#	96
FRESH TURKEYS Y TOMS 14-24#	96
FROZEN TURKEYS Y HENS 8-16#	66
FROZEN TURKEYS Y TOMS 14-24#	63-65
FROZEN TURKEYS Y TOMS 24-28#	65-72

**SAN FRANCISCO PROCESSED TURKEY
DELIVERED TO RESTAURANTS AND INSTITUTIONS**

	<u>RANGE</u>
TURKEYS Y HENS	119-129
TURKEYS Y TOMS UNDER 22#	99-125
TURKEYS Y TOMS 22-24#	99-125
TURKEYS Y TOMS 24-26#	99-129
TURKEYS Y TOMS 26 LBS & OVER	99-129

FRESH TURKEYS WITH TIMERS OR EQUIVALENT U.S. GRADE A,
DELIVERED FIRST RECEIVERS, EASTERN REGION
CENTS PER POUND, WEEK OF 04-AUG-2003

	(8-16#)	(16-24#)	
	HENS	LBS TOMS	LBS
	<u>PRICE</u>	<u>(000)</u>	<u>PRICE</u> (000)
SALES (PROMOTIONS INCLUDED)	65.67	42	63.50 10
SALES (PROMOTIONS NOT INCLUDED)	65.67	42	63.50 10
SALES (PROMOTIONS ONLY)			
SALES (PRICE TO BE DETERMINED)			

TURKEY MOVEMENT TREND (IN THOUSAND POUNDS)
SLAUGHTER-CERTIFIED RTC TURKEYS

JUNE	470,235*
JULY 1-26, 2003	386,078*
To date 2003	3,378,700*
To date 2002	2,982,521*

NUMBER OF TURKEYS SLTRD IN FEDERALLY INSP PLANTSBY GEOGRAPHICAL AREAS WEEK ENDING 26-Jul-2003
(PRELIMINARY) (RELEASED 12:00 NOON CENTRAL TIME)

		<u>YOUNG TURKEYS</u>		<u>TOTAL TURKEYS</u>	
		PCT	AVG	OLD	AVG
		CHG	LIVE	BANDED	LIVE
<u>-THOUSAND HEAD-</u>	<u>PW</u>	<u>WT</u>	<u>-THOUSAND HEAD-</u>	<u>WT</u>	
N EAST	873	1	21.05	(A)	875 21.05
SATL	776	4	30.05	(A)	778 30.05
N CENT	2,209	1	30.89	(A)	2,211 30.89
S CENT	458	-3	20.61	(A)	460 20.61
WEST	538	2	22.41	(A)	540 22.41
U.S. TOTAL	4,854(B)	1	27.08	10	4,864 27.08
TO-DATE					
2003	137,930(B)			440	138,370
TO-DATE					
2002	136,424(B)			235	136,659

(A) Not published to avoid disclosing individual operations.

(B) Number of young banded breeder turks included: this week 62,000 for the year 1,822,000; last year to date 1,417,000.

LIVE TURKEYS SLAUGHTERED

W/E 26-July-2003

	<u>YOUNG</u>		<u>YOUNG</u>	<u>OLD</u>	<u>TOTAL</u>
	HENS	TOMS	BREEDERS		
	<u>THOUSANDS</u>				
HEAD	2,034	2,758	62	10	4,864
AVG WT	15.50	35.67	24.89	31.91	27.08
LAST WEEK	2,010	2,723	71	27	4,831
SAME WK YR AGO	1,928	3,182	53	3	5,166
AVG WT	16.02	35.16	23.79	30.85	27.90
TO-DATE/2003	54,944	81,164	1,822	440	138,370
TO-DATE/2002	54,417	80,590	1,417	235	136,659

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NATIONAL YOUNG TURKEY PARTS AND BULK MEAT, FROZEN (UNLESS SPECIFIED), CENTS PER LB., DELIVERED FIRST RECEIVERS, PART AND FULL TRUCKLOTS AS OF 31 JULY 2003.

The market tone on bulk parts was steady to fully steady on drums and full-cut wings, balance mixed. Tom bulk parts demand was moderate to good on drums and full-cut wings, other parts light to fair. The trade sentiment on hen bulk parts was mostly steady. Trading was light on all items both domestic and export. For domestic: fresh scapula 55 cents and fresh breast trim 65 cents delivered to the midwest.

DOMESTIC TRADING	PRICE RANGE	L.S.T. CODE 1/	WTD AVG PRICE	VOLUME (000)
BREASTS, 4-8 LBS GRADE A 2/		M	85.33	120
BREASTS, 4-8 LBS GRADE A—FRESH 2/				
BREASTS, 4-8 LBS PLANT GRADE 2/		T	79.60	400
DRUMSTICKS, TOM	27.00		27.00	40
DRUMSTICKS, TOM—FRESH		M	26.00	80
DRUMSTICKS, HEN		W	24.00	40
WINGS, FULL-CUT, TOM	19.00-21.00		20.14	70
WINGS, FULL-CUT, HEN		W	21.00	10
WINGS, V-TYPE, TOM	24.00		24.00	20
WINGS, V-TYPE, HEN		R	54.00	3
NECKS, TOM		W	18.00	10
NECKS, HEN				
BREASTS, B/S, TOM 3/				
BREASTS, B/S, TOM—FRESH 3/	116.00-123.00		117.40	514
THIGH MEAT				
THIGH MEAT—FRESH		W	54.00	30
BREAST TRIM MEAT		W	55.00	80
SCAPULA MEAT				
TENDERLOINS				
DESTRAPPED TENDERS		W	82.00	120
DESTRAPPED TENDERS—FRESH		W	107.00	40
WING MEAT WITH SKIN				
MECHANICALLY SEPARATED 4/		T	15.00	40
MECHANICALLY SEPARATED—FRESH 4/		W	16.36	110
EXPORT TRADING				
DRUMSTICKS, TOMS		W	25.90	392
WINGS FULL-CUT - TOMS		W	20.00	108
WINGS, V-TYPE, TOM		T	23.00	156
TAILS	21.00		21.00	40
MECHANICALLY SEPARATED 4/	15.00		15.00	52
THIGH MEAT - FROZEN	67.00		67.00	52

1/ CODES FOR LAST SIGNIFICANT TRADE (L.S.T.): M=MONDAY T=TUESDAY W=WEDNESDAY R=THURSDAY F=FRIDAY

2/ Breasts are bagged; rib, back, and wing meat included; and basted.

3/ Boneless and skinless without tenderloins.

4/ 15-20% fat with skin added.

NATIONAL YOUNG TURKEY PARTS AND BULK MEAT, FROZEN (UNLESS SPECIFIED), CENTS PER LB., DELIVERED FIRST RECEIVERS, PART AND FULL TRUCKLOTS AS OF 1 AUGUST 2003.

Seller sentiment was steady to fully steady on fresh tom breast meat and fresh wing meat, balance mostly steady. Demand on fresh tom breast meat was in a full range, mostly fair with some buyers not needing full contract needs while others take additional product. Demand on the balance of fresh white meat was slow to moderate. Offerings of fresh white meat ranged from light to adequate with wing meat held with the most confidence. The trade sentiment on tom drums and full-cut wings was steady to fully steady, however some export buyer resistance was starting to be noted at the higher seller offering prices. Domestic trading light. Mechanically separated turkey traded consisted mostly of part loads. Fresh wing meat 40-42, fresh scapula 52, fresh breast trim 62 cents delivered domestic. Export trading was also light. For export: hen necks 14, fresh tom drums 26 cents delivered.

DOMESTIC TRADING	PRICE RANGE	LST CDE 1/	WTD AVG PRICE	VOLUME (000)	WEEKLY	WEEKLY VOLUME (000)
					WTD AVG PRICE	
BREASTS, 4-8 LBS GRADE A 2/		M	85.33	120	85.33	120
BREASTS, 4-8 LBS GRADE A—FRESH 2/						
BREASTS, 4-8 LBS PLANT GRADE 2/		T	79.60	400	79.91	440
DRUMSTICKS, TOM		R	27.00	40	26.80	50
DRUMSTICKS, TOM—FRESH	24.00-27.00		25.91	110	25.95	190
DRUMSTICKS, HEN	25.00		25.00	30	24.43	70
WINGS, FULL-CUT, TOM	21.00-23.00		21.79	190	21.13	310
WINGS, FULL-CUT, HEN	21.00		21.00	10	21.00	20
WINGS, V-TYPE, TOM		R	24.00	20	24.00	20
WINGS, V-TYPE, HEN						
NECKS, TOM	18.00		18.00	10	18.00	20
NECKS, HEN						
BREASTS, B/S, TOM 3/						
BREASTS, B/S, TOM—FRESH 3/	113.00-120.00		115.71	555	117.10	1,349
THIGH MEAT						
THIGH MEAT—FRESH		W	54.00	30	54.00	30
BREAST TRIM MEAT	54.00		54.00	40	54.67	120
SCAPULA MEAT						
TENDERLOINS						
DESTRAPPED TENDERS		W	82.00	120	82.00	120
DESTRAPPED TENDERS—FRESH	111.00		111.00	30	110.38	142
WING MEAT WITH SKIN						
MECHANICALLY SEPARATED 4/	20.00		20.00	20	16.67	60
MECHANICALLY SEPARATED—FRESH 4/	17.00-22.00		18.04	134	17.52	364
EXPORT TRADING						
DRUMSTICKS, TOMS	25.00-26.00		25.20	196	25.65	1,168
WINGS FULL-CUT - TOMS		W	20.00	108	20.00	108
WINGS, V-TYPE, TOM		T	23.00	156	22.64	243
TAILS	19.50		19.50	40	20.25	80
MECHANICALLY SEPARATED 4/	15.00-16.00		15.66	76	15.79	368
THIGH MEAT - FROZEN	49.50-51.00		50.82	222	55.69	1,022

1/ CODES FOR LAST SIGNIFICANT TRADE (L.S.T.):

M=MONDAY T=TUESDAY W=WEDNESDAY R=THURSDAY F=FRIDAY

2/ Breasts are bagged; rib, back, and wing meat included; and basted.

3/ Boneless and skinless without tenderloins.

4/ 15-20% fat with skin added.